

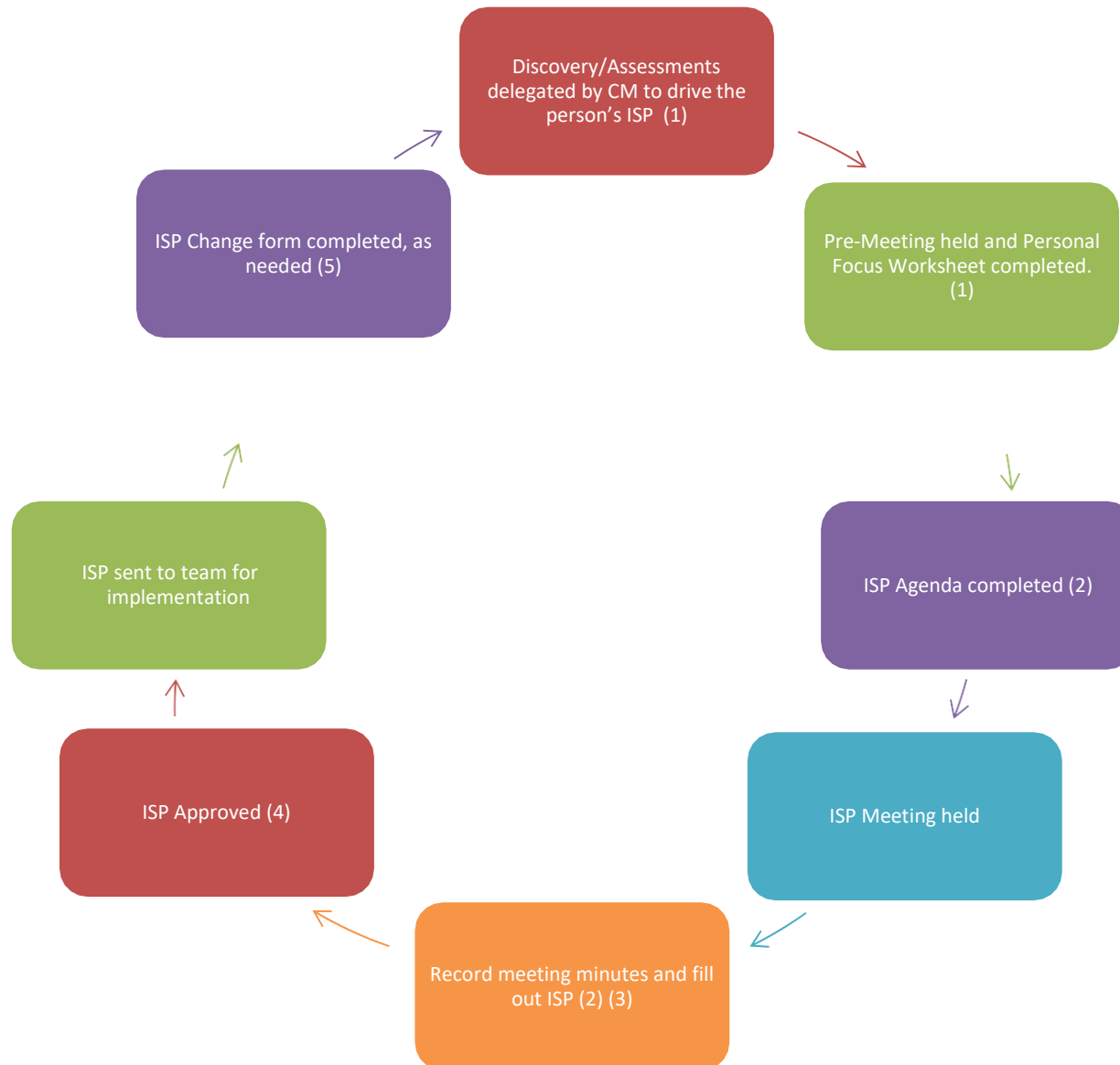
STANDARDIZED ISP-THERAPY USER GUIDE

October 1, 2019

The Standardized ISP and guide materials have been developed by the Division of Developmental Disabilities in partnership with the Conflict Free Case Management subcommittee of the Financial Workgroup and Therapy Services. The guide is intended to provide information for completion of the Personal Focus Worksheet, the ISP Agenda, and the Individual Support Plan within Therapy.



Person Centered Discovery and Planning Process using Therap



- (1) For more information about discovery tools, delegation of assessments, and completion of the Personal Focus Worksheet please refer to page 3.
- (2) For more information about the creation of the ISP agenda please refer to page 8.
- (3) For more information about recording of meeting minutes (as part of the ISP agenda) please see page 15.
- (4) For more information about how to complete the ISP, ISP approval please see page 23.
- (5) For more information about how to complete ISP revisions please see page 33.

The Therap guides were developed utilizing all the information and content from the original standardized ISP

INDIVIDUAL SUPPORT PLAN – OVERVIEW OF THE PERSON-CENTERED PLANNING (PCP) PROCESS IN THERAP

Therap's Individual Support Plan (ISP) allows you to collaboratively develop a person-centered plan of delivering services and supports to individuals. The ISP, in tandem with the Personal Focus Worksheet (PFW), and ISP Agenda can be used to design supports and activities for the individual and record decisions that are made among the team members in the planning process. The following workflow diagram describes how the Person-Centered Planning (PCP) process works in Therap.

Personal Focus Worksheet (PFW)

Personal Focus Worksheet reflects the perspective of the individual, the residential provider and, when applicable, the employment services provider as well as the perspectives of those who know and care about the individual. In the worksheet, you may enter responses to the 20 questions, the associated agenda questions, and Add Participants to the ISP team. The PFW answers can be directly accessed from and copied to the ISP and the ISP Agenda form.

You can get started with the person-centered support planning process by filling out the **Personal Focus Worksheet** with information from the perspective of the individual as well as information from the perspective of others who know and care about the individual. This will be based on information gathered through Person Centered Discovery tools and organizational assessments completed as warranted by the team.

1. Create a new **Personal Focus Worksheet** by clicking on the **New** link in the 'Personal Focus Worksheet' section of the 'Individual' tab.

| | | |
|-------------------|--------------------------------|----------------------------|
| To Do | Individual Support Plan | |
| Individual | Personal Focus Worksheet | → New Search |
| Health | ISP Agenda | New Search |
| Agency | Individual Support Plan | New Acknowledge Search |

2. Select the Individual for whom the Personal Focus Worksheet is to be created by clicking on the 'Last Name' in the Individual List page.

| Individual List | | |
|---|------------|---------------|
| <div> All A B C D E F G H I J K L M N O P Q R S T U V W X Y Z </div> | | |
| Filter: <input type="text"/> | | |
| Showing 1 to 17 of 17 entries | | |
| <div> First Previous 1 Next Last </div> | | |
| Last Name | First Name | Individual ID |
| Blankenship | Ryan | |
| Adkins | David | |
| Baker | Julie | |

3. In the **Personal Focus Worksheet** (PFW), you will see 22 questions divided into six sections. Each question is followed by the Add button.

*Following are some questions which can be addressed in the **PFW**:*

- *What do others like and admire about me? (i.e. Question: 6)*
- *How do I participate in my community? (i.e. Question: 7, 18)*
- *What are my personal strengths and assets?*
- *Where can my personal strengths and assets be shared/used?*
- *What successes and accomplishments have I experienced in the past year? (i.e. Question: 18, 22)*
- *What do others need to know to support me best? (i.e. Question: 22)*
- *How do I want to spend my time? (i.e. Question: 2, 4, 5, 9, 22)*
- *Community-based and Relationship-based supports (i.e. Question: 14)*
 - *To complete, reference Community Based Section and Relationship Based Section of Services and Supports Star in LifeSpan folder materials AND Relationship Map in Discovery section. Also reference groups, clubs, organizations, etc., that the person is involved in.*

Personal Focus Worksheet

Status: Draft
Form ID: PFW-LINKCSD-E844T5WVDA57L
Last Updated By: Samantha Hynes, Program Specialist on 06/09/2016 01:03 PM
Created By: Samantha Hynes, Program Specialist on 06/02/2016 03:03 PM
Submitted By: Samantha Hynes, Program Specialist on 06/08/2016 02:43 PM
Returned By: Samantha Hynes, Program Specialist on 06/09/2016 01:03 PM

[Update History](#)

Person Receiving Services: Ryan Blankenship
Start Date: 05/01/2016 **End Date:** 04/30/2017

[Jump to](#)

Section 1 : Describes what is important to this person from his/her perspective

Question 1. Describe the relationships in this person's life:

Ryan is very close with his mom and dad and visits with them weekly. He has several close friends that he enjoys hanging out with at the archery center. Ryan goes biking a few times a month with his neighbors Jim and Theresa. Ryan has a sister who he only sees 1-2 times a year.

Agenda Question: Are there any relationships that should be developed or changed?

Ryan has mentioned that he would like to see his sister more often. Ryan attends St Joseph church and would like to participate in a bible study as a way to get to know some of the other men that attend.

[Edit](#)

Question 2. Describe what this person enjoys and list his/her interests:

Ryan is currently an active member of the Model Railroad Club, St Joseph Church, and the NFAA. He is able to attend activities in his community without support.

Agenda Question: Which of these interests are not happening as much as the person would like? From the team's perspective, which of these interests, if any, need to be limited?

Ryan would like to attend more meetings of the Model Railroad Club. Due to the fact that the club meets at the same time Ryan is working he is not able to attend as many meetings as he would like. There are no limitations in this area.

[Edit](#)

PFW Start and End dates coincide with the ISP dates. ISP starts on one date and ends one year later (i.e. 6/1/16 through 5/31/17).
***Tip: To change the 'End' date, change in this order: Year, Month, Day.**

4. Selecting the **Arrow** provides you with a drop-down list of questions to prompt deeper consideration of the answers. Once completed, click the **Done** button to return to the PFW form. However, the **Done** and **Go to Next** option takes you to enter an answer for the next question.

Add/Edit PFW Answer

Question 1. Describe the relationships in this person's life:

Who are the person's favorite people to be around at home, at work, or at school?
 Who does the person try to avoid? Why?
 Who are people, other than staff, that the person would like to be around?
 How does the person keep in touch with his or her favorite people? (visiting, letters, email, phone online, etc)

Ryan is very close with his mom and dad and visits with them weekly. He has several close friends that he enjoys hanging out with at the archery center. Ryan goes biking a few times a month with his neighbors Jim and Theresa. Ryan has a sister who he only sees 1-2 times a year.

About 2722 characters left

Agenda Question: *Are there any relationships that should be developed or changed?*

Ryan has mentioned that he would like to see his sister more often. Ryan attends St Joseph church and would like to participate in a bible study as a way to get to know some of the other men that attend.

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<< Back
Done Done and go to Next

5. Agenda Questions are intended to prompt further discussion needed to develop or enhance supports in place. Once the ISP Agenda is created, specific Agenda Questions from the PFW can be linked automatically to prompt this discussion at the ISP meeting.
6. With the Add Participants link, users can add participants to the PFW from Team Members section of the Individual Data Form. The 'Other' box can be used to add other participants as well. Ensure people who are important to the participant a part of the discovery process.

People who contributed to this Personal Focus Worksheet

Add/Remove Participants

People who contributed to this Personal Focus Worksheet

PFW Participants

Add Participants

Add From Team Members: - Please Select -

OR

If Other:

Relationship with the Individual:

Add Participant

<< Back Done

- Once all the information is filled out, you may choose to either Save, Submit or Approve the PFW depending on your permissions.

<< Back Cancel Save Submit Approve

- Then, you will see a notification of your chosen action.

The form PFW-TICT-E8B4QUJYSD28B has been Successfully Submitted

Display PDF

Back

The PFW needs to be approved by the CM before the information can be linked to ISP Agenda.

ISP Agenda

The ISP Agenda module is used to electronically record items that were discussed at the participant's ISP Planning meetings. The CM will add notes to the module once the meeting is over.

CREATE NEW ISP AGENDA

1. To create a New ISP Agenda, click on the New link in the **ISP Agenda** section in the Individual tab of your Dashboard, then select the Individual by clicking on the Select link on the same row as Individual's name in the **Individual List** page. Users with the *ISP Plan Update* role can create a new ISP Agenda.

The screenshot displays the 'Individual Support Plan' interface. At the top, there are two tabs: 'Personal Focus Worksheet' and 'ISP Agenda'. The 'ISP Agenda' tab is active, showing a 'New | Search' link. Below this, the 'Individual List' section is visible, featuring a filter dropdown menu with letters A through Z, a search bar, and a table of individuals. A red arrow points from the 'New | Search' link to the 'Individual List' section. Another red arrow points from the 'Filter' dropdown to the search bar. A third red arrow points from the 'Click to open an Agenda' button to the 'Last Name' column header. A fourth red arrow points from the 'Enter First or Last Name to filter' text box to the search bar. The table lists individuals with columns for Last Name, First Name, and Individual ID.

| Last Name | First Name | Individual ID |
|-------------|------------|---------------|
| Blankenship | Ryan | |
| Adkins | David | |
| Baker | Julie | |

2. You will see the full ISP Agenda with the Name and/or ID of the Individual, Status of the Form, and a Unique Form ID. Then you can select **ISP Meeting Date**, **Review Period Start** and **End Date**, and the **Meeting Type**.

| Form Info | |
|--|---|
| Individual Name: Ryan Blankenship Status: Approved Form ID: AGN-LINKCSD-E8A4RVUUMFZ83 Show Form Activity | |
| Update History | |
| ISP Meeting Date | <input type="text" value="04/29/2016"/> (MM/dd/yyyy) |
| Review Period Start Date | <input type="text" value="05/01/2016"/> (MM/dd/yyyy) |
| Linked PFW | PFW-LINKCSD-E844T5WVDA57L Start Date : 0 |
| Linked ISP being Reviewed | OISP-LINKCSD-E7E4Q2QZXKA9L Start Date : |
| Meeting Type | <div> <div>Annual</div> <div>--Select--</div> <div>Annual</div> <div>Change of Services</div> <div>General</div> <div>Intake</div> <div>Quarterly Review</div> <div>Six Monthly Review</div> <div>Transition</div> </div> |

Users can select Meeting Type from the options available in the Drop-down menu

- ISP Start Date indicates the date plan should be implemented.
 - No later than 30 days after the ISP Meeting Date.
- The Case Manager will use the 30 days between the meeting and the start date to finalize and approve the ISP documents, so they are ready for implementation on the plan start date.
 - CSP is responsible for developing ISP programs and be ready for implementation of the goals and supports on the start date.
- ISP End Date will be 365 days after the ISP Start Date. An example is below:
 - ISP Meeting on June 1, 2019
 - ISP Start Date July 1, 2019
 - ISP End Date June 30, 2020 (this allows for the previous plan to be implemented while the 2020 plan is in development)

Meeting types:

- Annual – should be used for the yearly plan completed every 365 days.
- Change of services – should be used for any update or team meeting that happens outside of the annual team meeting. For example: updates to a person's goals, changes to guardianship status, and changes in Community Support Provider or Case Management organization. *See Activate Change Form and Edit ISP" section for details regarding using/editing an ISP Agenda.
- Intake – should be used for an initial ISP.

- General, Quarterly Review, Transition, and Six-Month Review should not be utilized.

3. By clicking on the **Add** button in the **Individualized Items** section, you can edit the Individualized Agenda Topic. You can add discussion topics in the text field to guide your discussion. Agenda topics can be added from an Individual's PFW as well.

Discussion topics should be chosen based on the important themes identified in the personal focus worksheet. Each theme should have its own individualized item as a discussion topic. Each of the individualized items can pull in multiple questions from the personal focus worksheet. For example, one of the themes identified could be related to community employment. The case manager will describe the items related to employment that need to be discussed during the ISP and pull in the responses from questions 2,4,10,17, and 20 on the Personal Focus Worksheet.

- There should be multiple individualized items addressing a variety of different themes.
- Multiple questions from the Personal Focus Worksheet can be pulled into each individualized item.
- Not every question from the personal focus worksheet needs to be pulled into the ISP Agenda.
- PFW Questions can only be selected once and cannot be added to multiple discussion topics.

4. To discuss desired outcomes, you can add **Action Plans from ISP as Outcome** or **Add other outcomes** in the **Progress Towards Outcome** section of ISP agenda.

Progress towards Outcome

Add Action Plans from ISP as Outcome Add Other Outcome

Individual Service Plan List

| Form ID # | ISP Start Date | ISP End Date | Status | Action |
|-------------------------|----------------|--------------|----------|--------|
| OISP-TICA-E874LXXWJGD9 | 08/15/2016 | 08/29/2017 | Approved | Select |
| OISP-TICT-C494PTEZL4TVP | 02/03/2014 | 02/27/2015 | Approved | Select |
| OISP-TICT-ADG4J5FEU7 | 10/15/2012 | 03/31/2013 | Approved | Select |

Click here to link ISP Program

Progress towards Outcome

Description:
Effectively working in the Community

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Periodic Progress: Maintaining

Linked ISP Report: Link ISP Report

Cancel Done

Progress towards outcome can be tacked from the above menu and ISP reports can be linked

The previous year's ISP should be linked to the ISP Agenda to allow for review and discussion of last year's plan and evaluation of progress towards goals from the previous year when identifying goals for the upcoming year.

5. After adding Action plans from ISP and/or Other Outcomes, the Progress Towards Outcome section displays desired outcomes, periodic progress, and Linked ISP Reports, if any.

Progress towards Outcome

| Desired Outcome | Periodic Progress | Linked ISP Report | Action |
|--|-------------------|-------------------|--------|
| Will be discussed (Linked to Action Plan 1) Linked to ISP Program: Sketching | Completed | | Edit |
| Effectively working in the Community | Maintaining | | Edit |

Action Plans from Individual Support Plans appear as Desired Outcome here.

Progress status can be set from this menu

Add Other Outcome

Status of progress towards outcomes:

- Completed: The goal was met.
- Maintaining: The goal is still important to the person and they are engaged in activities related to the goal; however, it is not their focus, and it is not something the provider is collecting data on.
- Making progress: The person is still working on the goal and is making progress toward accomplishing the goal.
- Not making progress: The goal is no longer important to the person and is not something they are working on. If the person is not making progress towards goals the Case Manager should document why progress is not being made and what changes need to be made either to the goal, action steps, or what new goals are in place.
- Discontinued: The goal is no longer important to the person and they do not want to continue to focus on it. This should only be marked if the goal was ended before the goal was met. The case manager should document why the goal is being discontinued and whether changes need to be made to the persons plan or action items.

6. Select Required Items to your ISP Agenda to be discussed during the ISP Meeting or prior to meeting. Required Items help to collect participants' needs which can easily be presented in the ISP meeting.

Required Items

Individual: Jiminy Cricket
Form ID: AGN-CMDEMSD-HB54Q8UWQFLP

Select All

- ☐ Are Personal Finances managed by the CSP?
- ☐ Has the team discussed Medication Benefits vs. risk?
- ☐ Has ANE Participant/Guardian Training occurred annually?
- ☐ Has Grievance Training/Procedures occurred annually?
- ☐ Has the participant/guardian received training regarding their rights?
- ☐ Has Medication Self Administration been discussed with the team?
- ☐ Has the team discussed the amount of time a participant has alone?
- ☐ Has the participant/guardian been provided with Service Choice Notice?
- ☐ Has the participant/guardian been provided with Provider Choice Notice?
- ☐ Does the participant receive Alternate Services?
- ☐ Was the Participant involved in ISP facilitation?
- ☐ Were Team members involved in ISP development?
- ☐ Has the participant expressed an interest in obtaining advocacy?
- ☐ What is the current guardianship status? Do any changes need to be made to guardianship?
- ☐ Has the team reviewed assessments?

BackDone

All the Required Items specifically address Administrative Rules of South Dakota and are required to be discussed and documented in **EVERY** annual ISP document. The team can choose to discuss these questions prior to the meeting or at the annual meeting.

- Are Personal Finances managed by the CSP?
- Has the team discussed Medication Benefits vs. risk?
- Has ANE Participant/Guardian Training occurred annually?
- Has Grievance Training/Procedures occurred annually?
- Has the participant/ guardian received training regarding their rights?
- Has Medication Self Administration been discussed with the team?
- Has the team discussed the amount of time a participant has alone?
- Has the participant/guardian been provided with Service Choice Notice?
- Has the participant/guardian been provided with Provider Choice Notice?
- Does the participant receive Alternative Services?
- Was the participant involved in ISP facilitation?
- Were team members involved in ISP development?
- Has the participant expressed an interest in obtaining advocacy?
- What is the current guardianship status? Do any changes need to be made to guardianship?
- Has the team reviewed assessments?

7. CM can add external files to the ISP Agenda in the **External Attachment**.

- Please reference the Participant Information Storage and Access form provided by DDD for guidance of what document to attach to what module.

External Attachment

Total size of all the files attached cannot be more than 10 MB.

Upload New File

Choose File

No file chosen

Description

Upload

Back

Cancel

After you are done, you can either create, submit or approve the agenda.

Create

Submit

Approve

i

Successfully Submitted the ISP Agenda: AGN-TICA-E8F2V56WB1GD4 for Mary Active

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Record Meeting Minutes

Meeting Minutes should be recorded after the ISP meeting is held.

1. On the Dashboard, click on the [Search](#) link in the ISP Agenda module under the 'Individual Tab'.

| | | |
|-------------------|--------------------------------|----------------------------|
| To Do | Individual Support Plan | |
| Individual | Personal Focus Worksheet | New Search |
| Health | ISP Agenda | New Search |
| Agency | Individual Support Plan | New Acknowledge Search |

2. On the **Search ISP Agenda** page, enter the name of the individual and select the 'Approved' form status. If you type in a few letters of an individual's name, an auto-complete list will appear from where you can select the individual's name. You can enter other search parameters in order to narrow down the search results.

Search ISP Agenda

Form ID:

Individual:

Mary Active, 00001

Status:

Pending Approval

Approved

Deleted

Discontinued

Draft


Meeting Date From

To

Cancel

Reset

Search

 Users can record meeting minutes for **Approved** ISP Agenda only.

3. Next, you will arrive to the **Search ISP Agenda** page. Click on the form for which you would like to Record Meeting Minutes.

Search ISP Agenda

Status

6 items found, displaying all

| Form ID | Individual Name | Meeting Date | Start Date | End Date | Meeting Minutes Recorded? |
|--|-------------------|--------------|------------|------------|---------------------------|
| AGN-TICT-DAC4SYSKZGD8Q | Active, Mary | 05/01/2015 | 06/10/2015 | 08/01/2015 | Yes |
| AGN-TICT-DAB4U74XW4M6S | Active, Mary | 08/08/2015 | 08/04/2015 | 08/14/2015 | No |
| AGN-TICT-D6N556FZM496E | Lee, Alyssa | 04/01/2015 | 04/02/2015 | 04/02/2015 | Yes |
| AGN-TICT-CDC4U9NZ7ZN6A | Johnson, Elijah | 01/26/2015 | 01/27/2015 | 11/15/2015 | Yes |
| AGN-TICT-C9K4QV4UV7J7W | Johnson, Isabella | 07/01/2013 | 07/02/2013 | 01/02/2014 | No |
| AGN-TICT-B9V2E3F3M8VB | Wright, Andrew | 07/01/2013 | 07/02/2013 | 07/04/2013 | Yes |

[Export To Excel](#)
[New Search](#)

4. On the ISP Agenda, scroll down to the bottom of the page and click on the 'Record ISP Meeting Minutes' button.

Back Cancel Copy Edit Discontinue **Record ISP Meeting Minutes**

5. A warning message will display notifying that the **ISP Agenda will no longer be editable** once the Meeting Minutes are recorded. Click 'OK' to proceed.

The page at https://https://secure.therapser

ISP Agenda will no longer be editable once you enter meeting minutes into it, continue?

OK Cancel

6. You can then add comments for 'Individualized Items' and upload external attachments to the ISP Agenda. Once you are done Recording Meeting Minutes, click on the **Save** button.

Form Info

Individual Name: Mary Active, 00001

Individualized Items

| Title | Action Taken | Comments |
|---|--------------|-------------------------------|
| 1. Mary obtaining and keeping community-based job <i>Linked PFW Agenda: Question 1</i> | --Select-- | The meeting was successful... |

Add Comments to each Individualized Items here

Progress towards Outcome

Required Items

External Attachment

| Name | Description | File Size | Action |
|----------|-------------|-----------|--------|
| Tasks.bt | | 0 bytes | Remove |

Total size of all the files attached cannot be more than 10 MB.

Upload New File

Choose File

No file chosen

You can attach files here. Attached files can be removed from the list of attachments

Description

Upload

PDF

Display PDF

Once you are done, click the 'Save' button

Back

Cancel

Save

Individualized Items: Individualized Items are the items selected during the initial creation of the ISP Agenda. In the meeting minutes, the CM will address all the items by selecting an option in the action taken column.

- Issue resolved: This can be used when the item has been addressed and no further follow up is needed. An example is below:

| Individualized Items | | |
|--|----------------|---|
| Title | Action Taken | Comments |
| 1. In past years Ryan has worked seasonally at the Menards garden center, team needs to discuss if this is something Ryan is still interested in. <i>Linked PFW Agenda: Question 10 , Question 17 , Question 18</i> | Issue Resolved | Ryan has decided that he wants to focus on his job at Culver's, learning to work at the counter and run the cash register. Ryan feels that by learning these new skills, he will have opportunities to work more hours and earn more money. |

- Action plan: This can be used when the Individualized Item needs to be addressed in the action plan (for instance if the Individual Item relates to a person's goals, action steps, etc.).

| | | |
|--|-------------|---|
| 2. Ryan is working on a saving money for a number of things including a car, a trip and a tattoo. Team should discuss employment and managing finances. <i>Linked PFW Agenda: Question 2 , Question 4 , Question 14 , Question 19</i> | Action Plan | See above information regarding earning more money. Ryan would also like to learn to balance his checkbook, access online banking/app on his phone, and develop a savings plan for his trip and tattoo. |
|--|-------------|---|

- Discussion record: This can be used when more detailed information is needed about an Individualized Item. it should include information staff needs to know to support the person but does not require an action plan.

| | | |
|--|-------------------|--|
| 3. Management of diabetes including increasing managing blood sugar independently and following a diabetic diet. <i>Linked PFW Agenda: Question 13 , Question 6 , Question 21</i> | Discussion Record | Ryan sometimes has difficulty following his diabetic diet when at work, as the food at Culver's is tempting and he sometimes forgets to pack his lunch. Ryan will be assisted to set a recurring alarm on his phone for the evening as a reminder to pack his lunch and another recurring reminder for the morning before he leaves to grab his lunch from the refrigerator. Staff will also assist Ryan to find the Culver's nutritional guide online or in the store to help him make healthier choices in the event he forgets his lunch. |
|--|-------------------|--|

Progress toward outcome: This is pulled forward from the initial creation of the ISP Agenda. The CM should make any additional comments about the outcome progress, etc.

| Progress towards Outcome | | | |
|---|-------------------|-------------------|--|
| Desired Outcome | Periodic Progress | Linked ISP Report | Comments |
| Ryan will lose weight through diet and exercise (Linked to Action Plan 1) Linked to ISP Program: Exercise | Making Progress | | Ryan has lost about 10 lbs in the past year. He has become much more active in managing his diabetes and loves to ride his bike around town. |
| Ryan wants to be competitively employed. (Linked to Action Plan 2) Linked to ISP Program: Job Seeking | Completed | | Ryan has worked Culvers for almost 9 months. He is doing really well and has made some friends at work. Ryan is hoping to learn to work the cash register and take orders, since he loves talking to people. |

Required Items: ALL items must be addressed by the team.

- Are personal finances managed by the CSP? - Personal Finances include wages, gifts, trusts, stocks and bonds, inheritance monies, etc. Documentation should include:
 - Why does the person need support to manage personal finances?
 - How is the person involved in managing their finances?
 - Training that has been/is provided, and the timelines for returning control to the person.
 - Include related rights restrictions if applicable.
- Has the team discussed Medication Benefits vs. Risk? Documentation should include the following:
 - Name of the psychotropic medication(s)
 - Side effects of the medication
 - Team discussion regarding how monitoring will occur the participant for major side effects and how concerns will be addressed
 - Team discussion regarding the benefits of the medications vs. risks and that documentation that the team has determined that benefit outweighs the risk.
- Has ANE Participant/Guardian Training occurred annually? Documentation should include the following:
 - Month, Day, Year training occurred
 - Note whether training occurred during ISP meeting, quarterly review, etc.
 - List all those who received training. If training did not occur with participant directly, indicate reason
 - Accommodations which were made for the person's communication style (pictures, ASL, provided in primary language?)
 - Content of the training needs to be attached to the Agenda.
- Has Grievance Training/Procedures occurred annually?

- Month, Day, Year training occurred
 - Note whether training occurred during ISP meeting, quarterly review, etc.,
 - List all those who received training. If training did not occur with participant directly, indicate reason
 - Accommodations which were made for the person's communication style (pictures, ASL, provided in primary language?)
 - Content of the training needs to be attached to the Agenda.
- Has the participant/guardian received training regarding their rights?
 - Month, Day, Year training occurred
 - Note whether training occurred during ISP meeting, quarterly review, etc.,
 - List all those who received training. If training did not occur with participant directly, indicate reason.
 - Accommodations which were made for the person's communication style (pictures, ASL, provided in primary language?)
 - Content of the training needs to be attached to the Agenda.
- Has Medication Self Administration been discussed with the team?
 - Determine if the level of medication administration is appropriate
 - What supports need implemented if the participant expresses a desire to self-administer?
 - If the participant self-administers their medications and has a Scheduled II Controlled Substance, the team must decide the safest way to store and account for the medication and document this in the ISP.
 - Medication Self Administration assessment needs to be attached to the Agenda.
- Has the team discussed the amount of time a participant has alone?
 - Unsupervised time, access to staff, and safe environments must be considered
- Has the participant/guardian been provided with Service Choice Notice?
 - Was the participant provided information about all the services that are available? Has there been discussion regarding appropriateness of services?
- Has the participant/guardian been provided with Provider Choice Notice?
 - Was the participant provided information about all the Community Support Providers and all the Case Management providers in South Dakota?
- Does the participant receive Alternative Services?
 - How did the team determine appropriateness of alternative services? Alternative services must be related to a goal which addresses at least one of the following:
 - Communication
 - Socialization
 - Mobility
 - Health and physical fitness

- Leisure and retirement or both
 - Educational and functional skills
- Was the Participant involved in ISP facilitation?
 - Describe how the participant is involved in preparing for and facilitating their own ISP meetings and participation in developing goals and supports. Did the person decide who to invite or not invite?
- Were Team members involved in ISP development? Documentation should include the following:
 - Who the participant invited to be a part of the ISP and how they participated in development of the ISP? Indicate whether the person named is an official member of the team. Attendance at annual or special team meetings does not automatically make a person part of the ongoing team.
 - If team members and/or those most important to the person were not able to be physically present, describe how their input was obtained for development of the ISP. Were creative options for attendance pursued, such as Skype, FaceTime, conference call, etc.?
- Has the participant expressed an interest in obtaining advocacy?
 - Has information been provided to the person about an advocate, their role, and how to obtain an advocate?
- What is the current guardianship status? Do any changes need to be made to guardianship?
 - If Independent Adult, does the person need assistance making decisions? If so, which type of decisions? Is there someone who advocates well for the participant?
 - If Guardianship in place, is the current guardian appropriate? Is the guardian making decisions on behalf of the person or for the person? Is the person included in the decision-making process?
 - If current guardianship is deemed by the team to be inappropriate, what follow up will occur to address the concerns? Include in Action Plan section of ISP.
- Has the team reviewed assessments?
 - Which assessments are warranted for the person?
 - Were all assigned assessments completed?
 - Which other assessments might be needed?

There are three ways to address required items:

- Discussion Record: Rather than choosing Action Plan, Select Discussion Record, then add notes related to the topic. In the ISP you will then be able complete the “discussion” “decision” and “related to action plan” columns-when selecting the “related to action plan”, you can note which desired outcome and action steps are related to the discussion record item. *Explain that when selecting Action Item, all the contents/discussion are automatically entered

as one action item, CM would then need to re-enter as separate steps. DO NOT USE ACTION ITEM section in Required Items.

-

| | | |
|---|-------------------|--|
| 7. Has the team discussed the amount of time a participant has alone? | Discussion Record | Ryan can be in the community, as long as he can contact staff and have a response within 15 minutes. At his apartment, he has contact with staff every 12 hours due to medication administration or other support needs. |
|---|-------------------|--|

- **Deferred:** This should be selected if the item is not applicable to the person. Examples of items which may be deferred include but are not limited to medication administration, medication risks vs benefits, alternative services, and advocacy.


| | | |
|---|----------|--|
| 2. Has the team discussed Medication Benefits vs. risk? | Deferred | Ryan does not take any psychotropic medications. He only takes medications for seizures and diabetes only. |
|---|----------|--|

- **Issue Resolved:** This should be used if the item was addressed and taken care of in its entirety at the ISP meeting. Examples include but are not limited to ANE annual training, grievance training, and rights training.

| | | |
|---|----------------|--|
| 3. Has ANE Participant/Guardian Training occurred annually? | Issue Resolved | Ryan and his sister were informed of agency policy on ANE 4/29/18. Ryan also received training using a you tube video about protecting himself from various forms of abuse, neglect, and exploitation. |
|---|----------------|--|

Every required item must have documentation in the comments section regarding the discussion of these items during the ISP.

7. After clicking on the **Save** button, a notification will appear of a 'saved' ISP Agenda.

 Successfully Saved Meeting Minutes into the ISP Agenda: AGN-TICT-B7J2SRQVS7JFK for Mary Active

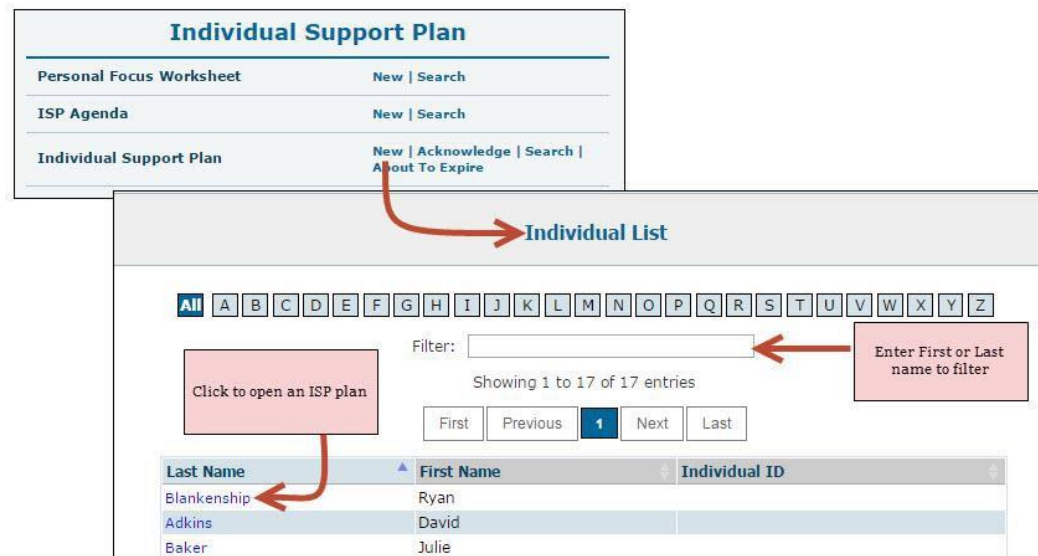
Individual Support Plan

The ISP provides an enhanced workflow for planning and documenting Individuals' supports. With the ISP, the user can record an individual's personal details including Risks, Professional Services, Action Plan, Discussion Records, and Service Supports.

1. Click on the Individual tab from your dashboard. In the Individual Support Plan module, click on the New link on the 'Individual Support Plan' section to get started with creating the ISP.



The 'Individual List' page will then load. On the 'Individual List' page, click on the last name under the 'Last Name' column to create ISP for the Individual.



2. You will be directed to the ISP for that Individual. The status of the ISP will set to 'New' as it is a completely new ISP for that individual. On the ISP, the 'Individual Name,' 'ID Number,' and 'Date of Birth' are auto-populated from the Individual Data Form (IDF) of that Individual.

Choose if the individual has a legal Representative/Guardian by selecting Yes/No. If you choose Yes, then do not forget to mention the name in the 'Name' field that is right beside it. Enter the 'Meeting Date,' 'ISP Start Date' and 'ISP End Date.'

- ISP Start Date indicates the date plan should be implemented.
 - No later than 30 days after the ISP Meeting Date.
- The Case Manager will use the 30 days between the meeting and the start date to finalize and approve the ISP documents, so they are ready for implementation on the plan start date.
 - CSP is responsible for developing ISP programs and be ready for implementation of the goals and supports on the start date.
- ISP End Date will be 365 days after the ISP Start Date. An example is below:
 - ISP Meeting on June 1, 2019
 - ISP Start Date July 1, 2019
 - ISP End Date June 30, 2020 (this allows for the previous plan to be implemented while the 2020 plan is in development)

ISP Form Info

Jump to

Status: Draft

Form ID: OISP-LINKCSD-E894P5NWZD28V

Last Updated By: Julie Hand, Program Specialist on 06/13/2016 07:49 AM

Entered By: Dona Deal, Resource Coordinator on 06/07/2016 01:56 PM

Submitted By: Samantha Hynes, Program Specialist on 06/08/2016 03:20 PM

Returned By: Samantha Hynes, Program Specialist on 06/09/2016 10:43 AM

Update History

As users scroll down the ISP page, the "Save and Continue Editing" button floats on the top of the page.

Save and Continue Editing

Demographic information is auto-populated from the IDF form

Individual Name: Ryan Blankenship

Date of Birth: 12/25/1985

Does Individual have a Legal Representative/Guardian? ☐ No ☒ Yes

Name

Victoria Blankenship

ISP Meeting Date

04/29/2017

(MM/dd/yyyy)

ISP Start Date

05/01/2017

(MM/dd/yyyy)

ISP End Date

04/30/2018

(MM/dd/yyyy)

Users can specify ISP Meeting date, ISP Start and End date

Enter Legal Representative/Guardian's name

3. In the **"What is most important to the Individual?"** text area, you can import the answer from the PFW of the Individual, specifically the answer to the **"What is most important to this person from his/her perspective?"** question.

Suggested pertinent questions from the PFW:

- Describe the relationships in this person's life. (Question 1: Refer to Relationship Map and Matching Tool)
- Describe what this person enjoys and list his/her interests. (Question 2)
- Describe what this person wants to accomplish in the future. (Question 4)
- List and describe what are most important to this person from his/her perspective (Question 5)
- What does this person want to learn? (Question 19)

This section is also where the Case Manager should capture information related to who was invited to the ISP meeting, who attended, and discussion that occurred throughout the meeting. If people were invited to the meeting but were unable to attend, notes should include how input was gathered and considered in plan development.

What is most important to the Individual?

Ryan was present for his meeting today. He provided active discussion about the things he has accomplished over the past year and goals he looks forward to working towards in the future. He prepared the meeting invitations, chose the location and the date of his meeting.

Ryan is good at drawing and writing. He is also good at working with his hands to fix and build things. Ryan is writing a novel and has interest in learning more about how to improve his writing techniques. Ryan would like to get a driver's license and purchase a vehicle. He is interested in getting a tattoo.

The family members that are most important in Ryan's life are his parents, his sister, Victoria, and his Uncle Alan. Jim and Theresa are his friends that he likes to go bike riding with. Harvey and Neal are two other friends that Ryan enjoys spending time with. Ryan has acquaintances through the groups he is involved in at the Archery Center, St. Joseph Church, the Model Railroad Club and the Old Iron Tractor Society. He goes to the Summit Center several times a week to swim, work out and play basketball with friends. Ryan likes to decide what he is going to be involved in by learning about activities through other people or in the listings in the Yankton Events Calendar. It is important to Ryan to be well connected and have a presence in the community. He fulfills this through the groups he is a part of, his employment at Culver's, his volunteer work and his participation in community activities. He is able to attend activities in his community without support.

Ryan lists traveling to Branson for a Christmas trip, getting his job at Culver's, increasing his archery skills and making improvements to his bike as some of his biggest accomplishments this past year.

Other things that are important to Ryan are having his own apartment, earning a paycheck and having money to travel, being on time (especially to work), making his own decisions and having the opportunity to sleep in or take naps. He is satisfied with the amount of hours he works at Culver's at this time and has expressed interest in learning how to operate a cash register.

Maximum 30000 characters

[Import from Personal Focus Worksheet](#)

The answer from the "What is most important to this person from his/her perspective?" section is copied into the box above

4. In the **Risk** section, the CM will add risks by clicking on the Add Risk link. Here you would add the Risk Type from the Drop-down list which offers a wide range of Risk types. The risk section should capture risk related to medical conditions, supervision, legal issues, behavioral concerns, rights restrictions, safe environment, and healthy living.

CSPs must provide the Case Manager with documents outlined below, as they are developed by the CSP for implementation purposes but must be attached to the ISP by the Case Manager. Attachments for the risk section shall include (but are not limited to):

- Protocols-seizure, suicide, choking, falls, run-away, etc. as listed in the Risk Type dropdown menu

- Due process – Human Rights Committee and/or Behavior Support Committee signatures reflecting approval or disapproval of:
- Rights Restrictions – at least annually
- Behavior Support Plan – at least every six months
- Emergency Rights Restrictions – whenever implemented, review by a quorum of the HRC
- Functional Analysis addressing root cause of behavior
- Documentation of positive approaches implemented prior to approving and implementing more restrictive procedures

5. On the **Professional Services Individual Uses/Needs** section, add key professional contacts for the individual by clicking on the [Add Professional Services](#).

| Professional Services Individual Uses/Needs | | | | | | Jump to |
|---|--------------------------------------|--|--|---|-----------------|---|
| Name (Responsible Organization) | Contact Type - Type of Specialist | Contact Information | Specific reasons for this specialist | How Often or Due Date | Where to Record | Notes |
| Dr. Scott Weber | Primary Physician - General Practice | Yankton Medical Clinic 1104 W. 8th Street, Yankton, SD 605-665-8910 | annual physical and general medical care | annually and as-needed | Therap | Exam also includes diabetic well check. Continue meds and diabetic diet as prescribed. Lab work done annually or more often as necessary. |
| Dr. Richard Barth | - Endocrinologist | Sanford Clinic Diabetes and Thyroid 1305 W. 18th Street Sioux Falls, SD 57105 605-328-8700 | check Diabetes | every 6 months | Therap | Your A1C was 6.1, with a target of 7 or below. No recommended changes at this time. |
| Dr. Jerome Freeman | - Neurology | Sanford Neurology Clinic Vermillion, SD 605-555-1234 | Seizures | annually | Therap | Blood work to be repeated in 6 months. Return for annual next year. No recommended changes at this time. |
| Jessie Scott, DDS | - Dentist | 1101 Broadway, Suite 105 Yankton, SD 605-665-2448 | dental cleanings and exams | every 6 months | | return every 6 months. The general condition of your teeth is good. You received a new partial in October 2010. |
| Kim Comoyer | - Psychology | Great Plains Psychological Services 401 S. Carnegie Place Sioux Falls, SD 57106 605-323-2345 | individual counseling | monthly or as recommended by counselor and team | Therap | Counseling began in 2014. |
| Add Professional Service | | | | | | <div>Click to add Professional Service information</div> |

The fields below are not required within Therap and should be left blank. If the person has a medical Power of Attorney or other designated supportive decision maker, this should be included in the Individual Data Form within Contacts and/or within Discussion Record in the ISP.

| | | | |
|--|---|--------------------------------|--|
| Does this person have a Nursing Care Plan at home? | <input checked="" type="radio"/> No <input type="radio"/> Yes | Where Found | <input type="text"/> |
| Does this person have a Nursing Care Plan at work? | <input checked="" type="radio"/> No <input type="radio"/> Yes | Where Found | <input type="text"/> |
| Does this person have a Health/Medical Problem List? | <input type="radio"/> No <input checked="" type="radio"/> Yes | Where Found: | |
| | | Home | <input type="text" value="Medication book, Therap"/> |
| | | Work | <input type="text" value="Medication book, Therap"/> |
| Does this person have a Health Care Representative? | <input checked="" type="radio"/> No <input type="radio"/> Yes | If Yes | <input type="radio"/> Self Appointed <input type="radio"/> ISP Team Appointed |
| Appointment date | <input type="text" value="MM/dd/yyyy"/> | Where is the document located? | <input type="text"/> |

6. On the **Service Support** section, click 'Add Service Support' button to add service support information for the individual.

Service Support Jump to

Add Service Support

| Name (BusinessName) | Service | Physical Address | Mailing Address | Phone(s) | Typical Weekly Schedule | Action |
|---------------------|---------------------------|-------------------------------------|-------------------------------------|------------|-------------------------|----------------------|
| Waiver Service | Group Day Home Service | 123 Main Street, Any Town, CT 12345 | Same as Physical Address | 0123456789 | MWF-9-11AM | Edit |
| Vocational Training | Vocational Rehabilitation | Varies | 123 Main Street, Any Town, CT 12345 | 0123456780 | TTH-9AM-2PM | Edit |

Add Service Support

- List waiver service providers, number of hours per week and how much support is to be provided.
- List other services such as Speech, Hearing, Language; Medical Equipment and Drugs, and Other Medical as deemed appropriate by the team.
- List any other non-waiver Resources/Funding the person is accessing (Vocational Rehabilitation, Housing Assistance, SNAP, TANF, Independent Living Services, Energy Assistance, Medicare Part D, VA/BIA, Burial Trusts, Renter's Insurance, Life Insurance).

7. The Action Plan section in the Individual Support Plan is next. Here all the actions which need to be implemented can be included. Click on the Add Action Plan link in order to add action plans. The ISP must include at least one goal which should reflect what is important to the person. Include the intended outcome of the goal, ex. “Faye practices her karate so that she earns her orange belts and stays fit.” Avoid jargon and language that reflects “power over” rather than “power with.”

- Goals should evolve from year to year based on the experiences the person has had when goals are similar in nature.
- Goals should relate to specific waiver services accessed.
- The check-box for **Action Plan for Employment/ ATE Services** must be selected, a list of options will then appear under **Reason for Planning**. Please select an option from the list that appears. The **Reason for Planning** section corresponds to the Person-Centered Employment (PCE) Planning Guide. Teams should use the Guide to direct conversation regarding the person’s desired employment outcomes. Participant responses and direction should drive an Action Plan to assist the person to achieve those desired outcomes.

Enter **Desired Outcomes** and **Issues** into the respective areas that are available.

Action Plan for
Employment/ATE Services
☒

Reason for Planning

☐ I am making a plan to maintain or improve my current job.
☐ I want to get a job in the next year.
☐ I want to discover more about work and my skills and get a job in the next two years.
☐ I don't want to work right now.
☐ I am in school and planning for work after graduation.

Desired Outcome*
3000 characters left

Need/Issue*
3000 characters left

- Click on the Add New Action Step link in order to add action steps
- Click on the Add Outcome Measure link to select tags for outcome measures

| | |
|--|---|
| Measurable steps that will be taken to reach desired outcome | |
| Add New Action Step | Click here to Add New Action Step |
| Outcome Measure | |
| Add Outcome Measure | Click here to Add Outcome Measure |
| ISP Program | |
| Link ISP Program | Click here to Link ISP Program |
| Back | Done |

- Action steps should include how the person is involved in reaching the desired outcome. If support staff is solely responsible, the team should consider whether the action item is more appropriately captured in the risk section or discussion record. A blank example is below:

| | |
|--|--|
| Measurable steps that will be taken to reach desired outcome | |
| Action Step 1 Description of Measurable Step* | |
| <input type="text"/> | |
| 1000 characters left | |
| Is at Home? | <input type="checkbox"/> Who is Responsible <input type="text"/> |
| Is at Work? | <input type="checkbox"/> Who is Responsible <input type="text"/> |
| Is at Other Place? | <input type="checkbox"/> Who is Responsible <input type="text"/> |
| How Often or Due Date | <input type="text"/> |
| Where to Record | <input type="text"/> |
| Notes | <input type="text"/> |
| 3000 characters left | |
| Remove | |

Action Plan
Jump to

Action Plan 1

Desired Outcome: Ryan would like to travel the country so that he can visit family, go to races, and visit national attractions.

Need/Issue: Ryan states that he would benefit from assistance to save money and research and plan trips of interest.

| Measurable steps that will be taken to reach desired outcome | | | | |
|--|---|---------------------------------------|------------------------------------|---|
| Description of Measurable Step | Who is Responsible | How Often or Due Date | Where to Record | Notes |
| Ryan receives assistance from staff to research and plan his trip including saving and budget his money. | For Home: Ryan, Emily and Stephanie For Work: For Other: | ongoing with a target date of 01/2017 | Therap S-Comm, checkbook register, | When a trip is planned, Ryan receives assistance with packing his clothes and medications. Ryan has traveled to a variety of places throughout the United States. Some of the trips have involved WWE events, the Daytona 500, NASCAR and Disneyland, to name a few. Ryan has traveled with companies and groups. He has also taken a Greyhound bus on his own to visit his sister in Kansas for Christmas. |
| Ryan will receive assistance to complete applications with travel companies. | For Home: Helen For Work: Jake Herbert For Other: | As needed | Trip Planner | |
| When a date for Ryan's trip (s) has been determined, he will need to request time off from Culver's | For Home: For Work: Hannah, Job Coach For Other: | Once per trip | Trip Planner | Ryan is required to submit leave requests at work at least two weeks ahead of time. Staff will assist him as needed to complete the requests. |

Outcome Measure(s):

ISP Program:

- Action Plans can be linked to ISP Programs. ISP Programs are detailed descriptions regarding how actions will be implemented and are written by the direct support provider. Not all ISP Programs must be linked to an Action Plan.
- Click on Link ISP to add any existing ISP Programs
- Click on the Done button at the bottom once you have entered all the necessary information

8. A Discussion Record can be created for most any information about the person (i.e. adaptive equipment, technology, self- advocacy training, accessibility, financial status/representative payee, celebrations, achievements). Discussion Records document what staff need to know to support the person. The Discussion Record section can be individualized for each person. Items included in the Discussion Record section could also be included in the Risk section or identified as an Action Plan.

Click on the 'Add Discussion Record' link in order to enter any discussions in progress and decisions taken.

Items that were marked for "Discussion Record" in the individuals and required items will pull into this section. Case Manger will complete the "discussion" "decision" and "related to action plan" columns. When selecting the "related to action plan", you can note which desired outcome and action steps are related to the discussion record item.

The screenshot shows a web form titled "Discussion Records" with a "Jump to" link in the top right. Below the title bar is a yellow bar containing the text "Add Discussion Record". A red arrow points from this bar to the "Discussion Record" header of the main form. The main form is titled "Discussion Record" and "Ryan Blankenship". It contains three text input fields labeled "Need/Issue*", "Discussion", and "Decision", each with a "3000 characters left" indicator. Below these is a "Selected Action Plan:" label and an "Add Action Plan" link. A red arrow points from a pink box labeled "Click to add Action Plan" to the "Add Action Plan" link. At the bottom of the form are "Back" and "Done" buttons.

9. In the **External Attachment** section, necessary documents can be attached by clicking on the [Add External Attachment](#) link. **Please refer to the Participant Information Storage and Access Guide.

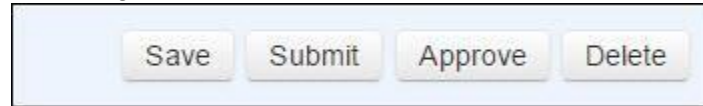
- Use the signature sheet provided by DDD, DO NOT use the signature sheet in the Therap system. This will help you gather the ISP team's acknowledgement of the person's involvement in planning and balance of preference and needs.

The screenshot shows a table titled "External Attachment" with a "Jump to" link in the top right. The table has three columns: "Name", "Description", and "Action". Below the table is a yellow bar containing the text "Add External Attachment". A red arrow points from this bar to the "Add External Attachment" link.

10. You may choose to **Save**, **Submit**, or **Approve** the ISP by clicking on the respective button located at the bottom

of the **Individual Support Plan**.

- The Case Manager writing the ISP will **Save** or **Submit** the completed plan. Once the CM has saved or submitted the ISP, it can be printed by clicking on the **Display PDF** link. CM will send a copy of the ISP document to the CSP for their review and approval. Once this task is done, the ISP will then be **Approved**. The ISP may be approved by the CM, CM supervisor or designee.



- Once the CM, CM supervisor or designee has approved the ISP it will appear in to CM's **To Do** tab as needing to be Acknowledged. All team members must 'Acknowledge' the ISP once they have read it. By acknowledging the ISP, team members agree to provide the supports outlined. Once it is Acknowledged by the CM provider, the CSP will be able to do a Unified Search of the Individual Support Plan (option on the Individual Plan).

ISP Revisions

Create a Change Form

In order to update an Individual Support Plan form after it is approved, user will need to create a Change Form. Users assigned with **ISP Plan Update role** will have access to creating a Change Form.

The ISP change form is used to document any changes to the ISP, ISP Agenda, and PFW that occur outside of the annual ISP meeting. Meeting notes, PCT tools, assessments, etc. from the special team meeting can be attached to the Change Form.

When a change is to be made to an ISP Plan, users will be required to create a Change Form for the corresponding ISP Plan. The Change Form can then be acknowledged by the corresponding ISP Team Members, who are all the users who have access to an Individual through their Caseloads.

1. Click on the **Search** link in the Individual Support Plan section under the Individual tab on your Dashboard.

| To Do | Individual Support Plan | |
|------------|--------------------------|----------------------------|
| Individual | Personal Focus Worksheet | New Search |
| Health | ISP Agenda | New Search |
| Agency | Individual Support Plan | New Acknowledge Search |

2. On the Search ISP page, you may enter the Form ID of the ISP form or name of the Individual and select the Status as Approved. You may enter other search parameters in order to narrow down the search results. Next, click on the **Search** button to view the search results.

Search Individual Support Plan

| | | | |
|----------------|---|---|--|
| Form ID | <input type="text"/> | | |
| Individual | <input type="text" value="Isabella Johnson / 10002"/> | | |
| Status | <div>Approved Pending Approval Discontinued Deleted</div> | | |
| Meeting Date | From <input type="text" value="01/01/2016"/> | To <input type="text" value="10/31/2016"/> | |
| ISP Start Date | From <input type="text" value="01/01/2016"/> | To <input type="text" value="10/31/2016"/> | |
| ISP End Date | From <input type="text"/> | To <input type="text"/> | |

Search ISP

| | |
|-----------------------------|--|
| Form ID: | <input type="text" value="OISP-TICT-A953YFAZ8Q"/> |
| Individual: | <input type="text" value="Mar"/> |
| Meeting Date From: | <div><div>Mary Active, 00001</div><div>Abigail Martin, 1100</div></div> <input type="text"/> |
| ISP Start Date From: | <input type="text"/> |
| ISP End Date From: | <input type="text"/> |
| Status: | <div><div>Discontinued</div><div>Draft</div></div> <input type="text"/> |

Type in a few letters of the Individual's name and an auto-complete list will appear.

- Click to open the ISP Plan that you would like to make changes to from the search results.

Search Individual Support Plan

Individual Name

Johnson, Isabella

Status

Approved

4 items found, displaying all

| Form ID | Meeting Date | ISP Start Date | ISP End Date |
|-------------------------|--------------|----------------|--------------|
| OISP-TICT-E9Z2SEPSBJW9C | 05/31/2016 | 06/01/2016 | 07/25/2016 |
| OISP-TICT-E9Z2SCLW7JW9G | 04/15/2016 | 04/25/2016 | 05/30/2016 |
| OISP-TICT-E9Z2RCF3JWD5N | 03/01/2016 | 03/16/2016 | 04/10/2016 |
| OISP-TICT-E9Z2R97HLWD5N | 01/01/2016 | 01/02/2016 | 03/15/2016 |

[Export To Excel](#)
[New Search](#)

- On the Individual Support Plan, scroll down to the bottom of the form and click on the **Create Change Form** button in order to create a Change Form.

ISP Form Info

Status: Approved

Form ID: OISP-TICT-DAL4Q8ZYN4M6P

Approved By: Sophia Hayes, Direct Support Professional on 08/18/2016 02:55 AM

Last Updated By: Sophia Hayes, Direct Support Professional on 010/21/2016 05:03 AM

Entered By: Sophia Hayes, Direct Support Professional on 08/18/2016 02:55 AM

[Update History](#)

Individual Name: Isabella Johnson

Date of Birth: 10/07/1988

Does Individual have a Legal Representative/Guardian?

ISP Meeting Date 08/01/2016

ISP Start Date 08/15/2016

ISP End Date

BackCancel

AcknowledgeCreate Change FormEditDiscontinueCopy

5. Next, you will be directed to the Change Form. Under the Change Form Info area users can view the Status of the Change Form, the name of the Individual, the Form ID and status of the corresponding ISP form and by whom this Change Form is created.




The screenshot shows two overlapping windows from a software application. The top window, titled 'Change Form Info', contains the following text: 'Status: DRAFT', 'Individual Name: Isabella Johnson', 'ISP Form ID: OISP-TICT-E9Z2SEPSBJW9C', 'ISP Status: Approved', and 'Created By: Jacob Anderson, Case Manager'. The bottom window, titled 'Change Approval Process', shows a PDF icon and the text 'Change Form Approval Page'. At the bottom of this window are three buttons: 'Back', 'Save', and 'Activate', followed by a link 'Activate this and Edit ISP'.

The Change Form consists of the following sections:

Change Approval Process section is pulled from the Change Approval Process section in the associated ISP form. The Exceptions added to the associated ISP form is also pulled from there.

The screenshot shows a section titled 'Change Approval Process'. Below the title, it states: 'Team members will be contacted to obtain verbal approval for all changes to the ISP or Support Document(s)'. Under the heading 'Exceptions:', it lists: 'All changes must be discussed among the team members and Mary's family members before they are to take effect'.

In the next section user can add Change Date, Date sent to CSP Service Coordinator/Residential Specialist and Change Initiated By.

| Change Approval Process | |
|---|---|
| Team members will be contacted to obtain verbal approval for all changes to the ISP or Support Document(s). | |
| Change Date* | <input type="text" value="10/18/2016"/>  (MM/dd/yyyy) |
| Send Date | <input type="text"/>  (MM/dd/yyyy) <small>Date sent to Services Coordinator/Residential Specialist/Case Manager</small> |
| Change Initiated By: | <input type="text" value="Anderson, Jacob / Case Manager"/>  |
| If Other | <input type="text"/> |

In order to enter 'If Other', select the Change Initiated by as Select.

In the Document(s) you are changing, adding or discontinuing section users are able to select the check- box(es) from the predefined options that are available. The option that is selected is where the change is going to be made.

| Document(s) you are changing, adding or discontinuing |
|--|
| <input checked="" type="checkbox"/> Individual Support Plan <input type="checkbox"/> Safety Plan <input type="checkbox"/> Financial Plan <input type="checkbox"/> Protocol(s) <input type="checkbox"/> Other Document(s) |

The next section is available for providing details of the change's users will be making. The details can be entered in the

Reason for Change, List Specific Changes, and Where is the Change Documented?

| | |
|--|---|
| Reason for Change | <div>Another Risk Plan needs to be added.</div> <div>About 2964 characters left</div> |
| List Specific Change(s) | <div>Add another Risk Plan.</div> <div>About 2974 characters left</div> |
| Where is the Change Documented? | <div>In the Risk Plan document.</div> <div>About 2974 characters left</div> |

The Acknowledgement List section will list the names of the user(s) who has acknowledged the Change Form. Users will be able to select those team members from the list who have verbally acknowledged the changes for the ISP Change Form for an Individual. Users may **Add** or **Remove** users from the list by clicking on the links.

A screenshot of a web interface section titled "Acknowledgement List". Below the title is a sub-section labeled "Verbal Acknowledgement" which contains a text input field and a button labeled "Add/Remove".

Attachment (Change Form Approval Page) section is available for attaching external documents to the Change Form. Please note that the size of the file that you would like to attach cannot be more than 3 MB. Click on the **Browse** button in order to select the file that you would like to attach.

A screenshot of a web interface section titled "Attachment (Change Form Approval Page)". It contains two rows. The first row, labeled "File", has a "Browse..." button (highlighted with an orange box), the filename "Isabella Johnson.pdf", and the text "(Upload Limit is 3 MB)". The second row, labeled "Description", has a text input field containing the text "Other details regarding the change form.".

6. As part of the special team meeting, the Case Manager, will need to complete the ISP signature sheet and have it signed by all attendees and team members. Please use the signature sheet provided by DDD, DO NOT use the "Change Approval Page" in the Therap system.
7. The following buttons are available at the bottom of the ISP Change Form. The buttons are described as follows:
Save – This will save the Change Form in 'Draft' status.
Activate – By clicking on this button users will be able to activate the Change Form and may update the ISP later with the changes.
Activate this and Edit ISP – By clicking on this button users will be able to directly activate the change form and update the associated ISP

A screenshot of the bottom of a web form. It features three buttons: "Back" on the left, and "Save", "Activate", and "Activate this and Edit ISP" grouped together on the right. The "Activate this and Edit ISP" button is highlighted with a green border.

You may click on the **Back** button in order to return to the corresponding approved ISP form.

A Change Form can be in three status: Draft, Active and Close.

Save a Change Form

1. Click on the **Save** button located at the bottom of the ISP Change Form in order to save the form.

The screenshot shows the 'Change Form Info' section with the following details:

- Status: DRAFT
- Individual Name: Isabella Johnson
- ISP Form ID: OISP-TICT-E9Z2SEPSBJW9C
- ISP Status: Approved
- Created By: Jacob Anderson, Case Manager

The 'Change Approval Process' section is partially visible, showing 'Team members will be'. Below this, there is a 'Change Form Approval Page' link and a 'Back' button. At the bottom, there are three buttons: 'Save' (highlighted with a green border), 'Activate', and 'Activate this and Edit ISP'.

A success message will appear to confirm that the Change Form has been saved. Click **Done** to close the form or click **Back** to go back to the associated ISP Form.

A yellow banner with a green information icon and the text: 'Successfully Saved a Change Form of Individual Support Plan: OISP-TICT-E9Z2SEPSBJW9C for Isabella Johnson'.

2. In the Change Form section of the associated ISP Form, the status of the ISP Change Form will be displayed as Draft and Open will be displayed under the Action column.

| Change Form(s) | | |
|----------------|--------|----------------------|
| Change Date | Status | Action |
| 07/12/2016 | DRAFT | Open |

3. If you click on **Open**, you will be able to view the ISP Change Form in Draft status.

4. On the ISP Change Form, the external attachments can be removed by clicking on the **Remove** button.

| Attachment (Change Form Approval Page) | |
|--|---|
| File | Isabella Johnson.pdf Remove |
| Description | <input type="text" value="Other details regarding the change form."/> |

5. You may click on the **Display PDF** link in order to view the PDF of the ISP Change Form.



6. You may click on the **Delete** button in order to delete the saved ISP Change Form.

| | | | | |
|----------------------|----------------------|--------------------------|--|------------------------|
| Back | Save | Activate | Activate this and Edit ISP | Delete |
|----------------------|----------------------|--------------------------|--|------------------------|

Activate ISP Change Form

Click on the **Activate** button located at the bottom of the ISP Change Form

Change Form Info

Status: DRAFT
Individual Name: Isabella Johnson
ISP Form ID: OISP-TICT-E9Z2SEPSBJW9C
ISP Status: Approved
Created By: Jacob Anderson, Case Manager

Display PDF Change Form Approval Page

Back Save **Activate** Activate this and Edit ISP Delete

A success message will appear to confirm that the Change Form has been activated. Click **Done** to close the form or click **Back** to go back to the associated ISP Form.

i Successfully Activated a Change Form of Individual Support Plan: OISP-TICT-E9Z2R97HLWD5N for Isabella Johnson

1. In the Change Form section of the associated ISP Form, the status of the ISP Change Form will be displayed as **Active** and **Open** will be displayed under the Action column. You may click on **Open** in order to view the active ISP Change Form.

| Change Form(s) | | |
|----------------|--------|----------------------|
| Change Date | Status | Action |
| 07/12/2012 | ACTIVE | Open |

2. You will be directed to the active ISP Change Form. Click on the **Acknowledge** button located at the bottom of the page in order to acknowledge the changes mentioned in the ISP Change Form that will be reflected on the ISP Form.

The screenshot displays a web interface for an ISP Change Form. It features two main sections: 'Change Form Info' and 'Change Approval Process'. The 'Change Form Info' section contains the following details: Status: ACTIVE, Individual Name: Isabella Johnson, ISP Form ID: OISP-TICT-E9Z2R97HLWD5N, ISP Status: Approved, Created By: Sophia Hayes, Case Manager on 10/18/2016 11:38 AM, Activated By: Sophia Hayes, Case Manager on 10/18/2016 11:45 AM, and Last Updated By: Sophia Hayes, Case Manager on 10/18/2016 11:45 AM. The 'Change Approval Process' section states: 'Team members will be contacted to obtain verbal approval for all changes to the ISP or Support Document(s)'. At the bottom of the form, there is a navigation bar with a 'Back' button on the left and 'Acknowledge' and 'Edit' buttons on the right. The 'Acknowledge' and 'Edit' buttons are highlighted with a green border.

Change Form Info

Status: ACTIVE
Individual Name: Isabella Johnson
ISP Form ID: OISP-TICT-E9Z2R97HLWD5N
ISP Status: Approved
Created By: Sophia Hayes, Case Manager on 10/18/2016 11:38 AM
Activated By: Sophia Hayes, Case Manager on 10/18/2016 11:45 AM
Last Updated By: Sophia Hayes, Case Manager on 10/18/2016 11:45 AM

Change Approval Process

Team members will be contacted to obtain verbal approval for all changes to the ISP or Support Document(s).

Back Acknowledge Edit

3. You may also click on the **Edit** button which will display the active ISP Change Form in editable mode.

This screenshot shows the bottom navigation bar of the ISP Change Form. It contains a 'Back' button on the left and 'Acknowledge' and 'Edit' buttons on the right. The 'Acknowledge' and 'Edit' buttons are highlighted with a green border.

Back Acknowledge Edit

4. You may make the necessary changes and scroll down to the bottom of the page and click on the **Save** button. You may also click on the **Delete** button in order to delete the active ISP Change Form.

Change Form Info

Status: ACTIVE

Individual Name: Isabella Johnson

ISP Form ID: OISP-TICT-E9Z2R97HLWD5N

ISP Status: Approved

Created By: Sophia Hayes, Case Manager on 10/18/2016 11:38 AM

Activated By: Sophia Hayes, Case Manager on 10/18/2016 11:45 AM

Last Updated By: Sophia Hayes, Case Manager on 10/18/2016 11:45 AM

Change Approval Process

Team m

PDF

Display PDF

PDF

Change Form Approval Page

Back

SaveDelete

Once an ISP Change Form is activated, the **Active Change Form** link will appear under the Individual Support Plan area in the To Do tab of the Dashboard.

| | |
|---|---|
| <div> <div></div> <div>Personal Focus Worksheet - New Search</div> </div> | |
| Worklist | 1 |
| <div> <div></div> <div>ISP Agenda - New Search</div> </div> | |
| Approve | 1 |
| Pending Meeting Minutes | 2 |
| <div> <div></div> <div>Individual Support Plan - New Search</div> </div> | |
| Worklist | 1 |
| Acknowledge | 2 |
| Active Change Form | 2 |

Click on the **Active Change Form** link under the Individual Support Plan area. You will be directed to the Change Form Acknowledgement List page.

Change Form Acknowledgement List

| | |
|-----------------|------------------------------|
| Individual Name | Isabella, Johnson |
| Change Date | 10/18/2016 |
| Status | Active |
| Created By | Jacob Anderson, Case Manager |

2 items found, displaying all

| Form ID | ISP Form ID |
|----------------------------|-------------------------|
| OISP_CF-TINM-ECL4RGZXAZN6W | OISP-TICT-E9Z2R97HLWD5N |
| OISP_CF-TINM-ECL4RGYTDZN6U | OISP-TICT-E9Z2SCLW7JW9G |

Export To Excel

Once you click on the form you will be directed to the active ISP Change Form. Scroll down to the bottom of the ISP Change Form and click on the **Acknowledge** button in order to acknowledge the changes to be made to the associated Individual Support Plan.

Change Form Info

Status: ACTIVE

Individual Name: Isabella Johnson

ISP Form ID: OISP-TICT-E9Z2R97HLWD5N

ISP Status: Approved

Created By: Sophia Hayes, Case Manager on 10/18/2016 11:38 AM

Activated By: Sophia Hayes, Case Manager on 10/18/2016 11:45 AM

Last Updated By: Sophia Hayes, Case Manager on 10/18/2016 11:45 AM


Change Approval Process

Back

Acknowledge

Edit

A success message will appear at the top of the ISP Change Form when a user acknowledges the ISP Change Form.

 Successfully Acknowledged a Change Form of Individual Support Plan OISP-DEMO-A9W2XCWSM3

The name of the user will be displayed under the Acknowledgement list section on the ISP Change Form.

| Acknowledgement List | | |
|---|------------|----------|
| Name and Title | Date | Comments |
| William Harris, Direct Support Professional | 07/15/2016 | |

Once an ISP Change Form is acknowledged, counts under **Active Change Form** will be reduced by one.

Activate Change Form and Edit ISP


1. Click on the **Activate this and Edit ISP** button located at the bottom of the ISP Change Form.

Change Form Info

Status: ACTIVE
Individual Name: Isabella Johnson
ISP Form ID: OISP-TICT-E9Z2R97HLWD5N
ISP Status: Approved
Created By: Sophia Hayes, Case Manager on 10/18/2016 11:38 AM
Activated By: Sophia Hayes, Case Manager on 10/18/2016 11:45 AM
Last Updated By: Sophia Hayes, Case Manager on 10/18/2016 11:45 AM

Change Approval Page

Team members will


Change Form Approval Page

Back

Save

Activate

Activate this and Edit ISP

2. You will be directed to the Individual Support Plan of the Individual in editable mode. Once you have made changes to the Approved ISP, you may click on the **Update** button to incorporate the changes on the Individual Support Form and close the Change Form. Alternatively, you may choose to save changes but keep that Change Form active for further updates by clicking on the **Update without Closing the Change Form** button. The same ISP Change Form can be used for multiple ISP updates.

ISP Form Info

Jump to

Status: Approved
Form ID: OISP-TICT-E9Z2R97HLWD5N
Approved By: Jacob Anderson, Executive Director on 07/31/2016 06:37 AM
Entered By: Jacob Anderson, Executive Director on 07/31/2016 06:37 AM

PDF

PDF

Display PDF

ISP Signature Page


Back

Cancel

Update without Closing the Change Form

Update

- A success message will be displayed in either case to confirm that the Individual Support Plan form has been updated with the changes.

 Successfully Updated OISP-BDFL-ADE22MZN7U

- When you open the approved Individual Support Plan which was last updated by the **Update without Closing the Change Form** button, you will notice that the Change Form is displayed in Active status.

| Change Form(s) | | | | Jump to |
|----------------|--------|-------------------|--------|---------|
| Change Date | Status | Reason for Change | Action | |
| 10/18/2016 | ACTIVE | | Open | |

- If the approved Individual Support Plan was last updated by clicking on the **Update** button, you will find the status of the ISP Change Form displayed as Closed.

| Change Form(s) | | | |
|----------------|--------|--------|--|
| Change Date | Status | Action | |
| 07/15/2012 | CLOSED | Open | |
| 07/12/2012 | ACTIVE | Open | |

- Click on the **Open** link in order to open the Closed ISP Change Form. Please note that further changes cannot

be made to this ISP Change Form after the changes have been incorporated on the associated Individual Support Plan.

ISP Change Form

Change Form Info

Status: **CLOSED**

Individual NameIsabella Johnson

ISP Form ID: OISP-TICT-E9Z2R97HLWD5N

ISP Status: Approved

Created By: Jacob Anderson, Case Manager on 10/18/2016 11:38 AM

Activated By: Jacob Anderson, Case Manager on 10/18/2016 11:45 AM

Last Updated By: Jacob Anderson, Case Manager on 10/18/2016 12:27 PM

Change Date

10/18/2016

Send Date

Closing a Change Form

1. Open an Approved ISP and click on the **Edit** button at the bottom of the page.

Linked ISP Agenda

PDF

PDF

Display PDF

ISP Signature Page

Back

Cancel

Acknowledge

Create Change Form

Edit

Discontinue

Copy

2. Then, you will see a list of Active Change Forms. Click on the **Use This** button to the right of the Active Change Form that you'd like to close.

Select ISP Change Form

Active Change Form(s)

Select the one that applies to the changes you are about to make on the ISP!

| Change Date ▾ | Change Initiated By ▾ | Reason for Change | Action |
|---------------|------------------------------|-------------------|--|
| 10/18/2016 | Jacob Anderson, Case Manager | | <div style="border: 2px solid orange; padding: 2px 10px;">Use this</div> |

Back

3. You will be directed to the Approved ISP in editable format. Scroll to the bottom of the page and click on the **Update** button. This will put the active change form in Closed status.

[Display PDF](#)

[ISP Signature Page](#)

Back

Cancel

Update without Closing the Change Form

Update

Please be cautious as any changes made here will be recorded in the updated ISP.

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